

Quality Counts Peer Reviewer Rubric: **Matchbook Learning of Indiana** ➔**NEW** (Open August 2018) **K-8 A new Innovation Network Charter School in partnership with IPS**

The Quality Counts grant is competitive. A team of expert peer reviewers with experience in school improvement, management and direct experiences with charter schools will review grant applications. Each application will be reviewed a minimum of two times and may include further adjustments or reductions after awards are made. The review of the applications will utilize the criteria listed within the rubric included in the request for proposals.

Proposals that receive higher scores increase their likelihood of approval and receipt of funding at the requested levels. Department staff shall conduct a final review of all applications to ensure the application was completed with fidelity and complies with all requirements. Department staff shall determine the final budget for each subgrant recipient and will determine whether proposed activities are reasonable, allocable, and necessary. If the page limit of the application is exceeded, reviewers may reduce the total score by up to 10%.

Pre-Requisites Satisfied: **APR is NOT Applicable: NEW School Opens Fall 2018.**

1. Accountability Grade:
 - a. Accountability Grade of A or B
 - b. Evidence of strong academic results, including strong student academic growth and performance on ISTEP (i.e. above state average)
2. No Corrective Action in the following Categories:
 - a. Student Safety
 - b. School Finance
 - c. Operational Management
 - d. Statutory/Regulatory Compliance in Least Restrictive Environment and English Language Learner areas
3. School is not identified for Targeted Support and Improvement and meets subgroup needs through demonstrated success in significantly increasing student academic achievement, including graduation rates, for all students served by the charter school:
 - a. Economically disadvantaged
 - b. Major Racial and ethnic groups
 - c. Students with disabilities
 - d. Students with limited English proficiency

Peer Reviewer Instructions: The peer reviewer shall determine the band that best fits the holistic evaluation of each section in the grant narrative and then determine the strength within that band to arrive at a score. The peer reviewer shall provide a comment if a 0, 1, or a 6 is assigned.

Optional Competitive Preference Priority 1 (CPP1): Early Childhood, Postsecondary, and/or Rural Areas

0	1	2	3
Not included in the application; model will not focus upon any of the priority areas	Area of focus is indicated, but expected targets and outcomes, and specific populations are not mentioned.	Area of focus is clearly defined, expected targets and outcomes are described, specific populations are mentioned.	Area of focus is clearly defined, expected targets and outcomes are clearly described and supported by qualitative or quantitative data or specific measurable and assessable goals. Unique populations are clearly defined and described quantitatively and qualitatively.
<p>Comments: SCORE 3</p> <p>Page p 16</p> <ul style="list-style-type: none"> • <i>Area of Focus:</i> Unique model and school design, having students focus on postsecondary education and planning their pathways to get there from the very beginning of the school year. Starts with “When I Grow Up ...” campaign (with professional photographer & costume designer → dressing up students to match their goals & create posters displayed throughout school). • <i>Expected Targets & Outcomes:</i> Target goal → 100% of school’s minority & high poverty students will leave 8th grade on track with the plans, experiences, and skills documented to achieve the 21st Century Scholarship. 100% of students will go to HS on track; 90% receive college acceptance; and 100% of high poverty students receive 21st Century Scholarships. • <i>Qualitative/Quantitative Data or Specific Measurable/Assessable Goals:</i> School will track students’ progress and conduct surveys of students who have graduated from the Matchbook K-8 Indy school to review their preparedness for HS and their acceptance rates into college with scholarship. • <i>Unique Populations Clearly Defined:</i> Anticipated Student Population = 76% high poverty and 90% minority. Often students of poverty believe that other people get to go to postsecondary schools and into jobs they dream of and have a hard time picturing themselves in the roles. The “When I Grow Up” campaign, with the development of individual education pathways for students, focuses on the 21st Century Scholarship planning for them – allowing students to strive to reach goals that are attainable when given access to the supports and planning tools needed. 			

1. Charter School Vision and Expected Outcomes:

0	1-2	3-4	5-6
No description provided or cited.	Charter School vision included, no clear indication of community need/community communication, curriculum framework mentioned but not expanded upon, no clear description of how educational program will meet Indiana's academic standards or how students will develop 21 st Century skills, nor a clearly defined sustainability plan beyond the life of the grant.	Charter school vision included, community need and communication plan outlined. Curriculum framework, key instructional practices, and curriculum development guide outlined. Methodology for the proposed program to reach all learners is explained. A plan for how students will develop 21 st Century skills is present and a sustainability plan post-grant is outlined.	Charter school vision is fully developed and described, evidence to support community need for this program is clearly defined and presented, and a communication plan is clearly described. Curriculum framework, key instructional practices, and research to support the usage of these is clearly articulated. Specificity is used to demonstrate how the proposed program will support all students in meeting/exceeding Indiana's academic standards. The program's ability to help prepare students for college or develop 21 st Century skills is clearly defined. A sustainable, viable plan is articulated to continue the program beyond the life of the grant.

Comments: **SCORE 6**

- *Vision Fully Developed/Described:* (Charter Application, p 6, Section I, Vision)→p48 of proposal. Continually improve academic outcomes through personalization strategies to meet needs – and develop global citizens by providing all students with real world experiences to help them understand other perspectives, the world around them and the world beyond them. Equip ALL students with 21st century technology skills for today and tomorrow's technologies. Mission is to help students map out their individual pathways to reach their goals for who and what they want to become as adults.
- *Community Need Defined/Presented & Communication Plan:* (Charter App, pages 7-10, Section B. Need)→p. 49 of Proposal. IPS Wendell Phillips #63 (location for new Matchbook Learning school) has had annual "F" grade since 2012-13. IDOE data: nearly 80% of students in the near west side of Indianapolis attending IPS public schools are students of color; approx. 80% F/R lunch. 2015-16 data for Wendell Phillips: 28% passed ISTEP ELA; 29% math. Matchbook is the only blended, personalized, competency-based solution for turnaround in the country. Students in this area have limited high quality school options and those failing for three or more years (who need our services the most) cannot afford to wait on traditional approaches to catch up.

Communication Plan located by peer reviewer in Charter Application, Recruitment Process (p 53 of proposal). First priority: transitioning prior year School 63 students/families into new MBL school. MBL met with families prior to close of school year. Letters sent home inviting parents to a series of "coffee & donuts" with MBL principal. Door-to-door home visits. Direct marketing to neighborhood families not currently attending (via community centers; frequented locations). May include radio spots, targeted public bus advertisements, back-pack giveaways, etc. to recruit others. MBL also will participate in Enroll Indy system.

- *Curriculum Framework/Key Instructional Practices/Research-based:* (Charter App, pages 12-39, "Educational Services Provided")→54+ of proposal: Research-based in each of its components: small group instruction, curated online content, curriculum, and assessments – and instructional strategies taught (via PD) and used in classroom (reciprocal reading, formative assessment lessons, fact fluency, close reading, think aloud). The personalized education model includes key design elements cited by Martinez's research. Instructional best practices aligned to Foorman and Torgesen's "Critical Elements of a Classroom" (2011) research – plus research compiled by national practitioner groups (Math Design Collaborative and the Literacy Design Collaborative). Matchbook combines on-grade-level instructions with personalized instruction and monitored through the **MBL Spark platform** (meets students where they are to fill in content/skill gaps as they move toward competency). **Note:** MBL = Matchbook Learning.

MBL model of instruction is **80-120 minutes every day in each math and language arts blocks**. Students need sufficient time (pace) and opportunity (pathway) to demonstrate mastery.

- Every student assessed at start of year using an adaptive national assessment (Scantron's Performance Series) to establish student's unique starting competency level. This personalized learning starting point becomes known as a student's "Sparkpoint." From there, learning pathways determined.
- During "Learn & Practice" rotations, students select from a playlist of options on how they want to learn their next standards unit/gap standard (options include video, practice tasks, narrative text, essays, animation, game

- based, pencil/paper, etc.).
 - When assignment complete, they “Conference” with a peer and a teacher (i.e., a formative check for understanding to determine readiness to move to next stage of “Apply” their learning).
 - In “Apply,” student selects from at least two project options that will be graded by teacher against an established rubric. Student must score a “mastery level,” i.e., 75%/higher, before moving to “Assess” level.
 - Assess = take online unit assessment from Engage NY.
 - SMALL GROUP happens concurrently to the aforementioned stages, where teacher pulls small groups for focused teacher-led lessons on topics at their physical grade level.
- *Support for All Students/Meet IN Academic Standards:* (Charter App, pages 40-46 Section D. Assessment, Section E. Support; and Section F. Special Pops) → p 84 of proposal: CHAMPs classroom management & common school areas behaviors, “The Matchbook Way,” Parent Partnerships: teachers have 20-minute daily block of time where they are expected to make contact with parents (email and phone). “When I Grow Up” campaign. Program language options, videos, and adjustability of reading Lexile levels support EL students. Engage NY curriculum gives teachers guidance and modifications that specifically cater to EL needs and struggling readers – and those with IEPs. MBL model allows for more “push in” and inclusion of students with special needs in the traditional classroom. Individualized and small group instruction constantly occurs in the regular classroom.
- *Ability to Prepare Students for College OR Develop 21st Century Skills:* p 19 -- Matchbook’s mission is to focus on 21st century skills and prepare students to be college and career ready. Continually improve academic outcomes through personalization – and develop global citizens -- providing real world experiences. (Charter App, page 6 Vision; pages 12-39; and Daily Schedule – Attachment 4). Note: This piece is also verified in Competitive Priority Section.
- *A Sustainable/Viable Plan Articulated to Continue Program Beyond Grant Period:* CSP funds will be used for initial trainings, capacity building, supplies & equipment needed to restart a school as a new Matchbook Learning model school. Will sustain via (1) internal capacity to train others; (2) use of tools and Spark platform provided via grant funds; and (3) inclusion of annual replacement costs (10% of general fund for technology, replacement & maintenance of tools, and academic & social-emotional materials) in each year of the long-term budget.

2. Expertise of Charter School Developers:

0	1-2	3-4	5-6
No description provided or cited.	Key Personnel are identified. Data and analysis to support the program are vaguely described. No evidence that the proposed program will deliver strong growth and student achievement is presented. No analysis is presented.	Key Personnel are identified and described. Data and analysis that support the program are described. Some connections are made between the data and the program's ability to deliver academic growth and student achievement. Analysis is present but does not reference school's Annual Performance report from DOE Compass.	Key Personnel are identified and their qualifications are clearly described and relevant to the proposed program. Data and analysis that support the ability of the proposed program or replicated program are presented and demonstrate clear evidence that the proposed program will deliver strong academic growth and student achievement. Analysis references school's Annual Performance report from DOE Compass or similar report.

Comments: **SCORE 5**

Page p 21 (and Charter Application staff bios) → p 223 of proposal

- *Key Personnel/Qualifications Relevant to Proposed Program:*
 - **Sajan George: Founder & CEO.** Previously managing director with Alvarez & Marsal—where he led a diverse group of talented turnaround professionals across US, assisting underperforming education institutions. Worked alongside Governors, State Superintendents, Mayors, Chancellors and School Superintendents – along with Bill and Melinda Gates Foundation and Eli & Edythe Broad Foundation. S. George has run K-12 districts, employing Lead Turnaround partner tactics across major urban cities (St. Louis, New Orleans/Katrina); NYC Broad Prize winner; work with Washington, DC/Michelle Rhee and Detroit schools). Served as interim manager (not consultant).
 - **Dr. Amy Swann: Chief Academic Officer & Head of School.** Served as CAO for MBL to turn around schools in Newark, NJ and Detroit, MI. Previously led Bate Middle School (named a P21 Exemplar by the Partnership for 21st Century Schools, with their performance assessments widely published (Harvard letter, etc.)) Her leadership documented & featured in books, e.g., *Five Critical Leadership Practices: The Secret to High Performing Schools* (Ash & Hodge, 2017).

Detailed bio of Swann's Work Experiences provided on proposal pages 223-229.

Letters of Support submitted with Charter Application specifically praised the credentials, expertise and support provided by S. George and A. Swann – and the ability of the MBL model to turnaround student performance.

- **Replicate/Expand ONLY:** *Evidence of Prior Success--IDOE APR/Compass Data:*
Since this is a NEW school, Evidence not required. However, on pages 24-25, MBL provides specific examples of turnaround efforts with six low-performing (failing) schools in Newark and Detroit – with nearly all supported over a two-year period (one for three years).

MBL also provides this statement: “In both our last two charter schools, Merit Prep and Michigan Technical Academy, the State did not “restart” the schools under MBL – which meant the school’s historical performance (its “F” status or bottom 5% rating) was not reset with a clean slate and so these schools closed due to the historical performance prior to MBL and not because of MBL’s **double digit gains in proficiency and strong growth since takeover**. This led to our relocation to Indianapolis where a true long-term restart contract could be pursued.”

3. Charter School Goals:

0	1-3	4-6	7-9
No description provided or cited.	Description is partial, vague, or unclear. Inadequately addresses academic outcomes of students in a measurable format or include achievement data. Community communication plan is vague or not present.	Goals to address academic needs are described and connections are made to student outcomes. Methods for measuring success towards goals are mentioned but may be unclear. Student achievement data is referenced. A community communication plan is outlined to describe school goals.	Specific, measurable goals are clearly described and how academic outcomes of all students will be addressed and the measurement of progress towards goals is articulated. Student achievement data from state content assessment is included and incorporated into the explanation. A communication plan that has been well-thought out and includes multiple avenues to reach all stakeholders has been articulated with specificity.

Comments: **SCORE 9**

Page 25 –“Turning around a failing school takes first growth – and then increases on-grade-level proficiency numbers. Our **goal is accelerated growth leading to accelerated increased proficiency rates on ISTEP in math and reading.** Goals will be tracked by **increasing the number of students proficient in math and reading on ISTEP by at least 10% annually for the next seven (7) years.**

- *3-5 SMART Goals/Measurement Methods:* (Charter App, p 46)➔ p 88 of proposal
 - 100% of students will obtain 1 or more years’ worth of growth according to Scantron’s Performance Series in math (annually)
 - 100% of students will obtain 1 or more years’ worth of growth according to Scantron’s Performance Series in reading. (annually)
 - 85% of parents will feel the school has communicated with them about events and their child’s progress – using parent survey data as a data point/measurement tool.
 - 100% of students will earn at least 1 Citizenship Badge during the school year (sample badges attached in Charter Application).
 - **MBL Additional Goal, p 25 of proposal:** Take school from bottom 5% to the top 5% of schools in State, based on performance on ISTEP.
 - **P 25 of proposal:** Students will increase proficiency pass rates in **math and reading on ISTEP by at least 10% annually** for the next seven years.
- **Competitive Priority: Postsecondary Goal**
 - 100% of school’s minority & high poverty students will leave 8th grade on track with the plans, experiences, and skills documented to achieve the 21st Century Scholarship. 100% of students will go to HS on track; 90% receive college acceptance; and 100% of high poverty students will receive 21st Century Scholarships.
- *Communication Plan/Stakeholder Awareness of Goals via Multiple Avenues:* p 26 – School goals will be made public on the OEI (authorizer) website for all stakeholders to view and access. The goals and progress towards them will be discussed as part of the monthly parent council meeting agendas and the quarterly parent and community meetings. Students and staff will not only be aware of the goals, but will also receive individual coaching bi-weekly on how they are progressing on their individual goals that contribute to the school reaching these overarching goals.

4. Use of CSP Funding:

0	1-2	3-4	5-6
No description provided or cited.	Budget Narrative is partial, vague, or unclear. Few costs are reasonable or necessary. Explanation of how school will develop and maintain required capacity to continue program after grant life is inappropriate, not measurable, or not adequate. Ideas are disjointed.	Budget narrative addresses most line items and shows connection between the grant goals and the proposed expenditures. Many costs are reasonable but may not be allocable or necessary to reach project goals. Explanation of the program beyond the life of the grant is present but does not make clear how it will be maintained at a high quality level.	Budget narrative addresses each line item and demonstrates alignment between grant goals and expenditures. Nearly all costs are reasonable, allocable, and necessary to support project goals. A plan for continuing the program at a high quality level beyond the life of the grant is clearly articulated.

Comments: **SCORE 5** (applicant clearly meets defined Rubric expectations, but many budgetary issues surfaced)

Page 27 (and attached Budget excel document)

On page 27, the applicant is to be commended for breaking down anticipated CSP budget expenditures (for both the planning period and implementation in Year of (2018-19) – as they directly relate to each SMART goal described in the previous section. In doing so, however, occasional misalignment of details occurred between this narrative text (beginning on p 27) and the attached CSP Budget excel document. A couple of examples, to illustrate:

- Multiple personnel salaries (for starting 2-3 months early) described in the *narrative* on pages 27, 29 and 31 are listed at the bottom of the attached Excel Budget document (Planning Worksheet), but related costs are not supported (nor in alignment with costs presented in the Overall Budget worksheet).
- The narrative on page 27 describes the purchase of 65 laptops for staff (at \$65K), while the Budget shows 55 laptops (at \$55K).
- Descriptions of content and PD materials for ELA (provided in the narratives) are not in alignment with those described in the budget.

The following observations, therefore, are made *solely* on the basis of the information provided within the Budget excel document/worksheets, submitted with the CSP grant proposal.

- Budget narratives address each line item and demonstrate alignment between grant goals and expenditures.
- Overall, the costs appear reasonable, allocable and necessary to support project goals (minor possible exceptions are noted below).
- *Sustainability*: p 31 –Two key factors ensure that the school has the capacity to continue implementation and operation of the MBL model in a high-quality manner after the grant expires: (1) MBL will budget for annual 10% replacement costs and improvements, e.g., to support technology maintenance and replacement; and (2) the CPS grant funds build the capacity of the leadership team and staff so that training, monitoring and implementation can occur through local resources, and that crucial data systems that support the model are in place and aligned to Indiana Academic Standards and program goals.

The following notations are made in reference to the **Budget document** presented (Excel doc attached to proposal).

Worksheet for the OVERALL Budget

- While the Total cost of \$258,527 (Planning months) agrees with the figure presented on p 13 (Funding Requested), the line items totals do not agree with those described on the **Planning Year Budget**. Specifically:
 - **Personnel Costs** of (\$11,000 in Planning Year) are included in the Overall Budget that have not been specified in the Planning Year budget worksheet. *This is presumably for at least one individual hired 3 months early* (See Planning Worksheet, at bottom).
 - **Fringe Benefits** (\$4,000 in Planning Year) are included in the Overall Budget that have not been specified in the Planning Year budget worksheet.
 - **Property & Equipment**: The Overall Budget worksheet shows **\$133,300**. Conversely, the Planning Year worksheet for Property & Equipment identifies \$55,000 for staff laptops; and \$83,300 for three 12-seat

passenger vans, for a Total of **\$138,300** (a difference of \$5,000).

- **Other:** The Overall Budget worksheet shows **\$20,227**. Conversely, the Planning Year worksheet for “Other” identifies \$2,227 for social mixers and related **food/beverages** for HR recruiting events and \$20,000 for school summer community events for a Total of **\$22,227**. (a difference of \$2,000)
- **Food/beverage expenditures** are included within the activities to be supported via CSP grant funds. Typically, federal funds do not permit these expenditures. **Question for IDOE.**
- The Total cost of **\$641,473** (Year 1 Implementation) on the Overall Budget worksheet agrees with the figure presented on p 13 (Funding Requested). However, it does not agree with the Total costs shown on the Year 1 Implementation worksheet of **\$617,515** (a difference of \$23,958).
 - The Overall budget amount includes \$23,958 in Fringe Benefits that have not been specified within the Year 1 Implementation worksheet.

Worksheet for the PLANNING Year (Feb-July 2018)

Budget presented does not show total costs for each funding category. Based upon descriptions provided by the applicant, those totals appear to be:

- Property & Equipment: \$55K for laptops; \$83,400 for three 12-seat passenger vans – Total \$138,300
 - Supplies: \$10K for Math; \$20K ELA; \$30K PBL; \$25K Trauma Training – Total \$85,000
 - Contractual: \$5K one-month contract/class rosters/based on Spark data – Total \$5,000
 - Other: \$2,227 HR mixers & **food**; \$20K School Summer Community Events – Total \$22,227
- Subtotal of these items: \$250,527**
- Bottom of Planning worksheet identifies multiple staff positions to be hired 2-3 months early (Director of Ops; 2 AP positions; SpEd Director; and IT Manager). Salary amounts provided do NOT reflect anticipated CSP costs for a 2 or 3 month period. IF the OVERALL budget worksheet amounts are correct, \$11K is budgeted for personnel and \$4K for a total **additional cost of \$15,000**. **Clarification of actual anticipated costs-- and to whom they will apply -- are needed on the Planning Year budget worksheet.**

Assuming the aforementioned subtotals are correct, the **Planning Year budget is \$265,527** (\$250,527 + \$15,000). This figure **does not agree** with the \$258,527 amount shown on p. 13 (Funding Requested) – nor the OVERALL Budget (worksheet) amount shown of \$258,527.

Worksheet for the IMPLEMENTATION Year (SY 2018-19)

Budget worksheet presented does not show total costs for each funding category. Based on upon descriptions provided by the applicant, those totals appear to be:

- Travel: monthly costs relevant to Spark implementation – Total \$30,000
- Property & Equipment: student/instructional technologies – Total \$212,077
- Supplies: citizenship badges, flyers, **food**, math, ELA, Science, PBL – Total \$122,438 (per applicant)
- Contractual: Spark platform; user interface & experience; set structures, procedures, norms, and interactive ways to incorporate recess/movement into daily schedules; CTO oversight of initial implementation – Total \$157,000
- Program Staff Salary: Spark Engineer/Developer – Total \$96,000

Total of the aforementioned budgeted costs: \$617,515 (does not agree with Overall budget at \$641,473)

- Implementation budget **missing: \$23,958 in Fringe Costs** (for salaried Spark engineer)

\$617, 515 plus \$23,958 = Year 1 Implementation Total Costs: \$641,473 (agrees with p.13, Funding Requested)

The resolution of these issues will impact the **ACTUAL overall costs** proposed/approved. Based on Totals derived above, **TOTAL BUDGET is \$7,000 too high, i.e., \$265,527 Planning + \$641,473 Year 1 Implementing = \$907,000**

5. School Governance Plan and Administrative Relationships:

0	1	2	3
No description provided or cited.	The school governance structure description, school staff connections, and existing relationships with EMOs and CMOs explanation is partial, vague, or unclear. Information regarding school operations, charter school leader's decision making process, and staff cohesiveness is not evident, measurable, or adequate. Relationship between charter school leadership, governing board, and/or authorizer is poorly described. No plan for how timely and accurate data will be submitted. Ideas are disjointed.	The governance structure of the school is described but school staff connections and existing relationships with EMOs or CMOs are not adequately explained. A description of school operations, charter school leaders' decision making process, and staff cohesiveness is present. School board member recruitment process and board governance training are vaguely described. Relationship description between charter school leadership, governing board, and/or authorizers is described but lacks ability to demonstrate lack of conflict of interest. Data submission plan described.	The governance structure of the school is clearly described, articulating connections between school staff, any existing partnerships with EMOs or CMOs are clearly defined. School operations and charter school leaders' decision making process, as well as staff cohesiveness are explained with specificity. The school board member recruitment process is methodically described. Appropriate evidence of a governance training for board members is presented. Relationship description between charter school leadership, governing board, and/or authorizers is clearly described and demonstrates no conflict of interest. Data submission plan described and demonstrates ability to submit timely and accurate data.

Comments: **SCORE 3**

Page 34 (and Charter Application sections cited by applicant)

- Governance Structure Clearly Described (staff/partnerships):* MBL is a national 501(c)(3) non-profit, governed by a national board of seven members who are experts in the areas of charter schools, school turnarounds, next generation learning and assessments, education technology, strategy, finance, and leadership. MBL's Founder & CEO (Sajan George) also serves on this national Board.

 - National Board sets policy, determines strategy and informs changes to MBL's innovative model. Meetings held quarterly and include annual strategic planning retreat on the site of the school.
 - MBL Indy (the IPS Wendell Phillips School 63 site) is a completely independent, local non-profit that holds the school's charter and oversees the local school.
 - MBL Indy (MBLI) is governed by a separate local Indy Board that meets monthly.
 - MBL licenses the Spark technology platform to MBLI for minimal fee.
 - Indy leadership: CEO (Sajan George), CAO & full-time Principal (Amy Swann) – with Swann reporting to S. George.
 - Swann's leadership team: Two Assistant Principals of Academics; an AP of Culture; a SpEd Director; a Director of Operations; a Counselor/Social Worker; and a Parent Coordinator.
 - Leadership team and staff are employed by MBL Indy.
- Leader's Decision Making Process/Staff Cohesiveness:* (Charter Application p 50-52) → p92 of Proposal

 - CEO → accountable to Indy Board; ensures and reports monthly on school's progress on goals; ensures highest levels of fiscal integrity/transparency, academic growth, and stakeholder accountability. Ensures fidelity of MBL model.
 - Principal → responsible for the day-to-day running of the school, the safety and achievement of all students; safety & career development/growth of staff; and engagement/service of parents & families. Dr. Swann reports to CEO Sajan George.
 - National Board supports instructional practices (leading science, research and practices in education reform/technologies). Indy's core leaders routinely attend, speak and participate in national conferences/gatherings on education reform. National Board meets annually in Indianapolis to meet with local Board (build relationships, share learnings, and co-design/plan).
 - P 95 – School Principal works in concert with CEO to recommend for approval by the Board all curriculum selection, personnel decisions, budget allocations and vendor selections.
- School Board Member Recruitment Process (current & prospective):* p 36 Narrative. Initial Board and its members established. Recruitment of future members includes:

 - Establish year-round committee to prospect, contact, recruit, orient, support and provide ongoing training and

<ul style="list-style-type: none"> evaluation of members and their needs. Align recruitment of members to Board's strategic improvement plans, needs and goals. Profile the current board to determine needed expertise, knowledge, skills and relevant demographic factors. Focus on recruiting priorities to fill gaps identified by committee. Conduct first round of personal contact with top recruiting prospects (CEO and Board Chair) Schedule and conduct orientation sessions with prospective members to ascertain their time commitment; key skills, knowledge & assets matching priorities; ability to place MBL's purposes and interests above their own. Selection/appointment of new members to the Board.
<ul style="list-style-type: none"> <i>Governance Training for Board Members:</i> (Charter Application p 52)→p 94 Proposal. <ul style="list-style-type: none"> Governing Board meets monthly Board is trained on the policies/decisions it presides over. Board appoints a lead person as policy coordinator Initial training to local Board provides the groundwork on how to run a public meeting, State requirements, Board member roles, charter school finance, etc. (This initial "bootcamp" training is outsourced to a third-party, before formal Board meetings commence. Continuous board training happens both formally (annual Board retreat, facilitated by 3rd party) and informally (CEO meets individually with each member at least quarterly, coupled with site visits/classroom tours). <i>Relationships Described (among school staff/governing board, and/or authorizer with EMO/CMO). No conflict of interest:</i> NOT APPLICABLE (no EMO/CMO) <i>Plan/ability to submit timely & accurate data:</i> p 38 Narrative. School's Director of Operations will be responsible for overseeing, coordinating, tracking, and ensuring the timely and accurate data submission for State and federal reporting requirements. This will be monitored by the school Principal through a shared report tracker – with monthly progress reports and updates given to the CEO and school Board.

6. Student Recruitment and Admissions Process:

0	1	2	3
No description provided or cited.	Student Recruitment plan description is partial, vague, or unclear. No evidence to show compliance with Indiana code 20-24-5 is offered. Public lottery process is poorly described or not present.	Student recruitment plan is described and evidence of compliance with Indiana code 20- 24-5 is offered but may not be complete. Public lottery process is described.	Student recruitment plan is clearly articulated and evidence of compliance with Indiana code 20-24- 5 is presented. An appropriate public lottery process is clearly described.
Comments: SCORE 3 Page 38 <ul style="list-style-type: none"> <i>Student Recruitment Plan Clearly Articulated/Evidence of Compliance with IC 20-24-5:</i> (Charter App, p 11) → p 53 of Proposal <ul style="list-style-type: none"> Current Neighborhood Student Retention: MBL will prioritize transitioning all prior year students/families to the new MBL school. Meeting held with families before school year ends; personal letters sent home; series of "coffee & donuts" for parents to meet with MBL principal. Door-to-door and back-to-school social events in community. New Neighborhood Student Recruitment: Direct marketing to families in neighborhood not currently attending the IPS school. Awareness: community center outreach efforts, radio spots, targeted public bus ads, summer sign-up/back-pack giveaways. Participation in the Enroll Indy system. No apparent limitations/barriers to student enrollment identified. <i>Appropriate Public Lottery Process Clearly Described:</i> p 38 "Due to our participation in Indianapolis' unified enrollment system, Matchbook will not directly conduct the lottery. Rather, Enroll Indy will ensure the public lottery process allows for fair and equitable assignment of seats to student applicants." 			

7. Meet the Needs of Educationally Disadvantaged Students

0	1-2	3-4	5-6
No description provided or cited.	Proposal offers partial, vague, or unclear explanation of how school will complete with state and federal law to deliver services to students with disabilities, English learners, homeless students, and neglected and delinquent students. Explanation does not seem appropriate, measurable, or adequate.	Proposal presents explanation that may be somewhat unclear to describe how school will comply with state and federal law to deliver appropriate services to students with disabilities, low-income students, English learners, homeless students, and neglected and delinquent students. Explanation is generally, but not fully, appropriate, measurable, or adequate.	The proposal demonstrates how the school will comply with state and federal law to deliver appropriate services to students with disabilities, low-income students, English learners, homeless students, and neglected and delinquent students. Specific evidence to support the above mentioned areas is present.

Comments: **SCORE 4** (strong evidence for SpEd and EL, other populations not addressed here)

Page p 38 (applicant refers to Charter Application pages 44-46) → p 87 of Proposal

- *Students with Disabilities:* p 87 of Proposal.
 - Parents are contributing members of the IEP team. Together the team makes decisions that are subject to requirements for least restrictive environment.
 - MBL determines service delivery, following all Special Education rules in Article 7, FAPE and regulations issued by the IDOE.
 - IEPs are developed, revised and implemented in accordance with IDEA, as well as State laws and regulations.
 - MBL uses the training materials and videos provided by the IDOE's Office of Special Education and the Indiana EP Resource Center.
 - Children already identified are re-evaluated by the multidisciplinary team at least every three years.
 - The MBL model allows for more "push in" and inclusion of students with special needs in the traditional classroom. Individualized and small group instruction constantly occurs in the classroom.
 - When needed, "pull out" services and extended; one-on-one or small group instruction/assessments are provided in special needs classroom settings.
 - A Director of Special Education also works with leadership, staff, students, and parents to review all IEPs, perform re-evaluations, monitor programs and progress, ensure constant communication with stakeholders, and ensure compliance with State and federal regulations.
 - Compliance monitoring, goal setting, growth monitoring, and exiting the SpEd program is completed by a team (SpEd director, student's case manager, a parent) and in accordance with all State and federal laws.
- *Low-Income Students:* Not addressed in Charter Application, pages 44-46 (Pages 86-88 of Proposal)
- *EL:* p 87 of Proposal
 - MBL uses online content providers during the independent and blended portions of the instructional blocks to individualize for the needs of ELs (through program language options, use of video, and the ability to adjust the reading Lexile levels of the presented material or concepts).
 - The Engage NY curriculum gives teachers guidance and modifications that specifically cater to the needs of EL students and struggling readers.
 - Compliance monitoring, goal setting, growth monitoring and exiting the EL program is conducted by a team comprising the EL case manager, a parent, and in accordance with all State and federal laws.
 - EL students are identified through the Home Language Survey (for first time enrollees).
 - Home Language Surveys are kept in the students' file, regardless of the languages recorded.
- *Homeless:* Not addressed in Charter Application, pages 44-46 (Pages 86-88 of Proposal)
- *N/D:* Not addressed in Charter Application, pages 44-46 (Pages 86-88 of Proposal)

8. Community Outreach Activities:

0	1	2	3
No description provided or cited.	Evidence of parent, student, and community involvement in the planning and design of the charter school is partial, vague, or unclear.	Evidence of parent, student, and community involvement in the planning and design of the charter school is offered but does not seem fully appropriate.	Clear evidence of the involvement of parents, students, and community in the planning and design of the charter school is presented.

Comments: **SCORE 3**

Page 39

- *Parents, Students & Community Involved in Planning/Design:* As part of the selection process for Innovation Restart with IPS, MBL met with over 30 community parents, more than 20 community leaders, and over 90 parents from Wendell Phillips School #63 (site of new charter school). As a result of feedback from those meetings, MBL added specific extracurricular activities and elective subjects to its school model, including:
 - Finding non-aggressive extracurricular activities for girls, as requested by parents
 - Engineering and coding
 - Partnering with the Boys and Girls club in order to increase afterschool program opportunities
 - Partnering with the Boy Scouts and the Girl Scouts
 - Partnering with Read Up for student and parent ESL assistance
 - Ensuring that all of our students are on track for State-specific scholarship programs, such as 21st Century Scholars.

9. Fiscal Management Plan:

0	1-2	3-4	5-6
No description provided or cited.	A plan or process for maintaining internal controls over expenditures and record maintenance is partial, vague, or unclear. Explanation for charter school leadership responsibility for grant does not seem appropriate or adequate. Minimal or disjointed explanation for how state and federal funds will support school operations and student achievement is offered.	A plan or process for maintaining internal controls over expenditures and record maintenance is generally described. The grant management process is described . Charter school leaders are mentioned as responsible for the grant but explanation does not seem fully adequate. A description for how other state and federal funds will support school operations and student achievement is described but not fully adequate.	A plan or process for maintaining internal controls over expenditures and record maintenance is clearly articulated. The grant management process is clearly defined. Charter school leaders are demonstrated to be responsible for all aspects of the grants and not the CMO/EMO. A sufficient description for how other state and federal funds will support school operations and student achievement is provided.

Comments: **SCORE 4**

Page p 39 (Charter Application pages 55-57) →97-99

- *Internal Controls/Record Maintenance:*
 - **Financial bookkeeping and reports is outsourced to an independent accounting firm** that specializes both in non-profits and schools. This separation of responsibility (even with a single school) is viewed as important because it creates an appropriate separation of duties, seamless reporting and eliminates any potential for conflicts or weak internal controls. The vendor was being vetted (per information provided in the Charter Application).
 - **Cash on Hand:** Every week, the school's CEO will review the cash position of the school and work with the

outsourced accounting firm and management team to project their cash flow on a rolling 13-week basis. The **key driver of cash inflow is enrollment**; and cash outflow is payroll.

- **Annual Budget Developed in Three Phases:** (1) Estimate forecasted enrollment. Baseline staff to the current year student-to-teacher ratios (with modest cost of living increases). (2) Perform sensitivity analyses on the various revenue and expenditure assumptions. (3) Present to Board for discussion and eventual vote.
- School produces a monthly budget vs. actual report (including YTD) report for the Board. Every check/disbursement will be identified, along with a monthly bank reconciliation.
- All checks must be signed by a minimum of two employees (i.e., the school's Operations Manager & CEO) before presenting to the Board for a third signature.
- **Annual audit** will be completed by an **independent accounting firm** engaged by the Board.
- CEO leads **fundraising efforts**. Local efforts will partner with Maureen Krauss of the Indy Chamber of Commerce. National efforts tap into the CEO's network of national philanthropic funders. Such funds are not used for day-to-day operations, but rather for catalytic investments in further developing and refining Spark. (NewSchools Venture Fund, Draper Richards Kaplan Foundation, Chan Zuckerberg Initiative, Gates Foundation and Educause's Next Generation Learning Grant Challenges, CityBridge Foundation, etc.)
- *Demonstration that Charter School Leaders Responsible for All Aspects of CSP Grant:* There is not an EMO/CMO.
 - P 40. This grant's development was based of the MBL team's needs assessment for the successful launch of a new restart chart school. Looked at historical MBL Model, the specific community needs, and the planning materials required to begin with a strong foundation.
 - Decision making (from budgeting to roll out, implementation, monitoring, and outcomes analysis) has been and will be done as a team, including school leadership and the school's board members (with input from the school's Parent Council and community stakeholders).
 - Progress on purchasing, budget monitoring, milestones, implementation, and goal tracking will be done in a collaborative cloud-based Gantt project management document.
 - The responsibility for tracking progress, reporting progress in weekly leadership meetings, and giving reminders to responsible parties to keep the school on track to reach grant milestones (i.e., ordering supplies, scheduling PD, roll out strategies for programs) will sit with the Director of Operations.
- *Describes How Other State/Federal Funds Support Operations/Achievement:* p 41.
 - After start up grant support, all general school operations, materials, and staffing funded through the general fund (per pupil State funding), with school leadership setting aside funding annually for replacement costs.
 - Additional support for special populations will be funded through IDEA and federal Title dollars
 - General funds and federal Title II dollars will fund follow-up PD (and PD supplies) that staff requires for implementing the model at a high level.
 - To sustain technology used for 21st century skills experiences, individual pathways, and track towards 21st century scholarships, the school will use a combination of E-Rate funds and career technical education funds (when available from the State).

10. Facilities:

0	1	2	3
No description provided or cited.	A vague or unclear school facility plan is presented, and does not incorporate student enrollment's impact on facility needs. Transportation plan is mentioned but does not seem appropriate or adequate.	A generally appropriate school facility plan is presented, mentioned student enrollment and an adequate explanation of how student enrollment impacts facility needs. A transportation plan is described but may or may not be appropriate for student needs.	An appropriate and thorough school facility plan is presented, including how student enrollment impacts facility needs. A transportation plan appropriate for the school's student needs is presented. If transportation is not aligned with the needs of the school, this should be explained.
<p>Comments: SCORE 2</p> <p>Page 41 of CSP Proposal</p> <ul style="list-style-type: none"> <i>Facilities Plan Presented (including how enrollment impacts facility needs):</i> "Based on conversations with IPS Board of Commissioner and Administration, we anticipate presenting terms for our Agreement, including use of the facility, at the February IPS Board Meeting with full approval of the agreement at the March IPS Board meeting." <p>Page 57, Section G. Facility (Charter Application) → p 99 of CSP Proposal</p> <ul style="list-style-type: none"> Classroom capacity for 600+ students (CPS Proposal anticipates enrolling roughly 534 students) Playground & outdoor space for learning experiences Fixtures (bathrooms, water fountains) suited for primary grade students (K-3) Existing or ease of additional wiring, hot spots, and electric for technology needs (i.e., charging, strong internet access points for all classrooms) Building in updated and sound structural condition less than 15 years old. Renovations or construction not anticipated. Specific security measures not addressed by applicant. <ul style="list-style-type: none"> <i>Transportation Plan:</i> p 42 of Proposal: "Prior Innovation Restart Agreements with IPS have included transportation for students living within the boundary to the school at no cost to the operator. Matchbook anticipates this standard term being included in the agreement for Wendell Phillips School 63." <p>Page 58 (Charter Application) → p 100 of Proposal</p> <ul style="list-style-type: none"> MLB intends to offer transportation to those students who live in the boundary of the schools, as well as explore a partnership with IndyGo to offer student bus passes for those students who live outside the boundary. Exploring a free local app that easily facilitates potential carpooling among willing parents who live proximate to each other that may not fit either IPS or city bus routes. FYI: CSP budget includes the purchase of three 12-passenger vans. Applicant has not mentioned usage of those vans to accommodate student transportation needs (e.g., for students residing outside of IPS busing routes). Vans (as described in Budget doc) are envisioned for parent event transportation, transporting staff to neighborhoods and apartments & family pick-up; and relevant 21st Century Scholarship Activities for students (university and future job site visits) 			

11. Signed Charter School Assurances:

0	6
No signed assurances provided that the authorizer, charter school developer, staff, and management organizations will fully comply with the stated activities within the sub grant and employ appropriate internal controls to manage the grant.	Signed assurances are provided that the authorizer, charter school developer, staff, and management organizations will fully comply with the stated activities within the sub grant and employ appropriate internal controls to manage the grant.
<p>Comments: SCORE 6</p> <p>Authorizer OEI signature on p.9 and Assurances appropriately signed on page 11.</p>	

Matchbook Learning of Indiana (IPS Wendell Phillips School 63)
➔ NEW Charter School

Total Points (Out of 57): 50

Competitive Preference Points (+ Up to 3): 3

Total Score (Out of 57): 53

Additional Peer Reviewer Comments

- Proposal did not exceed established page limitations, i.e., no reduction in points.
- All required appendices submitted
 - A. Charter Application – p 44
 - B. Budget Narrative – Budget Excel Document attached to CSP Grant Proposal
 - C. Annual Performance Report – **NA for this proposal** – p 321
 - D. Non-profit Status – p 322
 - E. Enrollment/Admissions Policies – p 326
 - F. Agreement Contract with EMO/CMO – **NA for this proposal**
 - G. School Discipline Policies – p 326